

Follow these steps in order to award a contract for a Sole Source Approval request valued from \$25,000-\$250,000 for Non-CIP Funded Contracts or from \$25,000-\$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1544** or **ePA2625**):

Note: Sole Source Contracts requiring Council Approval – Go to next section of this document.

1. After PWC Consultant Services Coordinator (CSC) provides the Project Manager or Initiator (PM) the boiler, PM finalizes negotiations with Sole Source consultant and adds their project specific information to the data fields of the boiler.
2. PM forwards the draft Agreement in Microsoft Word format to PWC for review. Only the boiler obtained from PWC shall be used as no other boilers are acceptable. The consultant does not sign the agreement at this stage of the process. The draft Agreement must include:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation Schedule, and
 - c. Exhibit C – Time Schedule.
3. After PWC reviews the draft agreement, the project manager shall forward the draft to their department's Deputy City Attorney (DCA) for review. Once this review process is complete, the project manager will transmit a PDF of the Final Contract to the consultant for signature for Mayoral (non-Council) actions only. See Note 2 of step 5 below for instructions for awarding via City Council Action (E-1472).
4. The PM may start routing their award document (Form E-1544/E-PA2625) at this time. **The Final Contract signed by the consultant must be attached in OnBase before your action goes to external reviewers.** The PM should also update their Purchase Requisition to include the name of the selected consultant and the contract number for the project. The contract number should be typed into the "Texts" field.
5. **Note 1: Form E-PA2625 (for CIP funded contracts) or Form E-1544 (for non CIP funded contracts) are generally used. However, for non CIP funded contracts, if the selected consultant has been awarded more than \$250K in contracts or amendments in the current fiscal year (including the current award), City Council approval (via E-1472) will be required in order to award the contract. For CIP funded contracts the current fiscal year award threshold is \$1 million (including the current award) before an E-1472 is required for contract award. If your contract is partially or fully Operations & Maintenance (O&M) funded, please contact PWC for additional instructions.**

Note 2: If you discover that an E-1472 is required to award your contract DO NOT continue following the remainder of the steps on this page and please GO to page three (3) of these processing procedures.
6. Once the E-1544/E-PA2625 on OnBase is routed to external approvers the following items are emailed to Cindy Crocker at ccrocker@sandiego.gov:
 - a. Completed Consultant Award Tracking Form (provided to you by PWC). The top portion is completed by you and the bottom portion is completed and signed by the consultant.
 - b. The name of your assigned DCA.

- c. Confirmation the Consultant's insurance is compliant with Ebix (PWC will provide you instructions on this process at the time of our draft review).
 - d. Consultant's signature authority document (PWC will provide you additional instructions on this item at the time of our draft review)
7. PWC reviews the E-1544/E-PA2625, contract, Comptroller's Certificate, insurance and endorsements, signs the contract, approves the action in OnBase and then emails the package to the City Attorney's Office for final review and signature.
8. The City Attorney's Office reviews and signs the contract, approves the action in OnBase and emails the package back to PWC.
9. PWC issues a Notice to Proceed (NTP) and distributes a PDF copy to the Consultant, PM, & EOC
10. PWC assigns a SAP Outline Agreement number at this time. PM generates a Purchase Requisition (PR) for the Contract and PWC assigns a Purchase Order (PO) number.

Follow these steps in the order listed below to process a Sole Source Approval request valued over \$250,000 for Non-CIP Funded Contracts or over \$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1472** requiring Council Resolution or Ordinance):

1. After PWC Consultant Services Coordinator (CSC) provides the Project Manager or Initiator (PM) the boiler PM finalizes negotiations with Sole Source consultant and adds their project specific information to the data fields of the boiler.
 2. PM forwards the draft Agreement in Microsoft Word format to PWC for review. Only the boiler obtained from PWC shall be used as no other boilers are acceptable. The consultant does not sign the agreement at this stage of the process. The draft Agreement must include:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation Schedule, and
 - c. Exhibit C – Time Schedule
 3. After PWC reviews the draft agreement, the project manager shall forward the draft to their department's Deputy City Attorney (DCA) for review. Once this review process is complete, the project manager can forward four (4) PDF or hard copies of the agreement to the consultant for final signature.
 4. The PM may start routing their award document (Form E-1472) at this time. **The Final Contract signed by the consultant must be attached in OnBase before your action goes to external reviewers.** The PM should also update their Purchase Requisition to include the name of the selected consultant and the contract number for the agreement. The contract number should be typed into the "Texts" field.
 5. Once the E-1472 is ready for Docket (City Council Approval), the PM attaches the original contracts (4 total), a copy of Comptroller's Certificate, insurance and endorsements and forwards the package to the Docket Clerk.
 6. The E-1472 goes to Council for approval and then the contracts will go to the City Clerk (if approved by Council).
 7. The City Clerk should notify the PM when all four contracts have been recorded with a Resolution number (or Ordinance number) and are ready for pick up. PMs should keep in close contact with the City Clerk's Office to verify whether the contracts are ready and to remind the City Clerk that the Contracts need to be forwarded to the PM.
- Note: This document package is not automatically forwarded to PWC. After the Mayor's 10 day veto period has passed, it is the PM's responsibility to follow up with the Clerk's Office, pick up the package, and deliver it to PWC.
8. The PM returns all four contracts (plus a copy of E-1472, a copy of Comptroller's Certificate, and insurance certificates + endorsements) to PWC using a Routing Slip (provided to you by PWC).
 9. PWC reviews the E-1472, contracts, Comptroller's Certificate, insurance and endorsements, signs the contracts and then forwards the package to the City Attorney's Office for final review and signature.

10. The City Attorney's Office reviews and signs the contracts and notifies PWC when the contract is ready for pick up.
11. PWC issues a Notice to Proceed (NTP) and distributes the four contract copies as follows:
 - a. Forwards a duplicate original contract to the Consultant along with the original NTP letter
 - b. Retains a duplicate original contract and a copy of the NTP letter for the PWC file
 - c. Forwards a duplicate original contract and a copy of the NTP letter to the PM
 - d. Forwards the original contract to the City Clerk
12. PWC assigns a SAP Outline Agreement number at this time. PM generates a Purchase Requisition (PR) for the Agreement and PWC assigns a Purchase Order (PO) number.